

# Workflow Automation and Customization using Salesforce

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**Abstract** - Customer Relationship Management (CRM) software or systems are a variety of technologies that allow firms to manage customer connections in a seamless manner. One of the most well-known CRMs available today is Salesforce. It's a single integrated CRM platform that offers all departments a single shard view of every customer, including marketing, sales, and service. Digitalization alters both the sales and purchasing processes, which has an impact on the dynamics and labour allocation between suppliers and customers in the supply chain. For industrial marketing and supply chain management, this has significant ramifications. Salesforce offers a number of tools, including Approvals, Process Builder, Workflow, and Flow Builder, to help you automate the routine business operations in your company. Depending on the kind of business process you're automating, you'll require the ideal automation tool. The number one CRM platform in the world is completely accessible by employees via the Internet; no infrastructure needs to be purchased, set up, or managed; users simply log in and start working.

**Key Words:** CRM, Salesforce, Automation, IOT, Digitalization, SFA

## 1.INTRODUCTION

SFA systems were first used in the 1980s and have since been widely embraced in business-to-business settings where they are regarded as a "competitive imperative" that promotes "competitive parity". Information technology used to support the sales function is what defines and distinguishes SFA. The software, hardware, and service providers make up the SFA eco-system. There are various subcategories of SFA software companies.

Some vendors specialize in SFA. They compete with providers of enterprise suites that provide a broad range of IT solutions to assist company, including supply chain management, enterprise resource planning, and customer relationship management, as well as CRM suite providers that include SFA modules.

Vendors and consultants list several advantages of using SFA, including better cash flow, shortened sales cycles that result in quicker inventory turnover, and client relations, increased revenue, more accurate reporting, and improved salesperson efficiency, growth in sales, market share, win rates, cost-of-sales, and closing increased opportunities and profitability.

## II.WHAT IS SFA?

The use of computerized technologies to assist sales representatives and sales management in achieving their professional goals is referred to as sales force automation (SFA).

In the academic literature, a number of definitions of SFA have been put forth.:

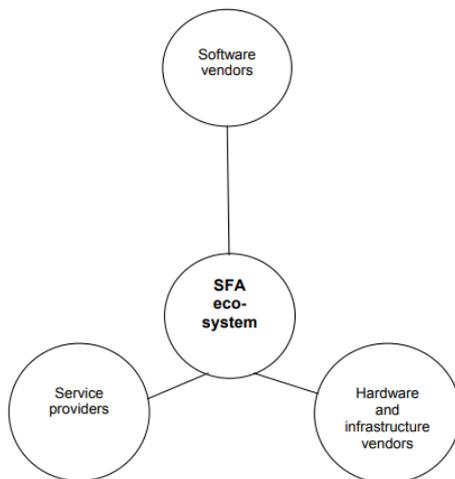
- SFA systems make use of computerized gear and software to offer automated information gathering, assimilation, analysis, and distribution to increase the productivity of sales forces.
- SFA systems are made up of centralized database systems that remote laptop computers can access using a modem and special SFA software, allowing salespeople to get regularly updated information about many parts of their jobs.
- Application of technology to the selling function is a component of SFA.
- SFA supports the sales process by improving the speed and quality of information flow among the salesperson, customer and organization.

There are various subcategories of SFA software companies. Some vendors have expertise in SFA. Vendors of customer relationship management (CRM) suites, who combine SFA modules into packages that function across the three front-office divisions of marketing, service, and sales, are their rivals.

SFA provides a mechanism for collecting, storing, analyzing and distributing customer related data to salespeople and managers. This generally includes both transactional and profiling data about customers, but might also extend to market data, competitor profiles, product libraries, pricing schedules and other information.

### A. The SFA Eco-System

As shown in Figure 1, the SFA eco-system is made up of SFA software suppliers, hardware and infrastructure manufacturers, and service providers.



**Fig 1:** SFA eco-system

There are various subcategories of SFA software companies. Some vendors have expertise in SFA. They face competition from providers of CRM suites with SFA modules and providers of enterprise suites with a broad range of IT solutions to assist business, such as supply chain management (SCM), enterprise resource planning (ERP), and customer relationship management (CRM).

Some SFA experts concentrate on certain SFA functional areas. For instance, Selectica creates specialised configurators. Companies can configure complex goods and services for customers using configurators, which are rule-based engines. Customers and configurators can communicate directly on occasion. For instance, users can create their own PCs using the Dell Computer website.

Users are guided through the purchasing and specification process by configurators, who present only viable options and features at each stage. This may assist management, salespeople, and customers alike.

### B. Why adopt SFA?

The implementation of SFA is said to have a number of advantages, according to vendors and consultants, including quicker cash flow, shorter sales cycles that result in quicker inventory turnover, improved customer relations, improved salesperson productivity, accurate reporting, increased sales revenue, market share growth, higher win rates, lower cost-of-sales, more closing opportunities, and improved profitability.

Softer results like fewer rework, quicker information, and better management reports can be used to balance out these hard outcomes. Case studies provided by suppliers attest to the effects of SFA.

These following advantages are appealing to various SFA stakeholders:

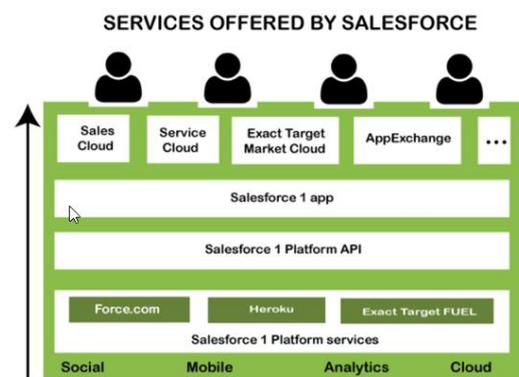
- Salespeople: shortened sales processes, greater possibilities for closing, and higher win rates
- Sales managers: increased salesperson output, enhanced customer interactions, precise reporting, and decreased cost of sales.
- Senior management: better profitability, quicker cash flow, more sales revenue, and market share growth.

### III. SALESFORCE ARCHITECTURE

Salesforce is a well-known CRM platform that provides partners, clients, and workers with a range of specialized services. It additionally offers a platform for developing customized apps, pages, components, and other objects, and does it effectively because to the architecture it uses.

Salesforce Architecture is made up of multiple levels that are layered on top of one another.

The structure's architectural view is depicted in Fig. 2 below:



**Fig 2:** Salesforce Architecture

### IV. SALESFORCE AUTOMATION TOOLS

#### A. Process Builder

An automated tool called Salesforce Process Builder allows you to manage the sequence of events and examine record criteria. This automation tool, together with Salesforce's new Lightning UI (User Interface), is easy to develop, has a wide range of possibilities, and has greatly increased the amount of declarative work that an administrator can complete.

The following features are available:

- Create a record.
- Update a field.
- Delete a record.
- Make a change to a related objects field.

- Make a phone call.
- Start a flow of thought.
- Send an email to [email protected] make a post to chatter.

The process builder can do almost anything. A lot more outcomes are possible than with procedures because there may be several choice points. Additionally, Salesforce has made it so simple to use that any administrator should have no trouble enhancing their organization's capabilities through the usage of the Process Builder.

## B. Workflow Rules

Workflow Rules are the most well-known and frequently used tool since they have been around for a very long time and are highly dependable. While compared to other tools, Workflows have some limitations in terms of capabilities, they are tremendously dependable, incredibly speedy, and remarkably easy to use.

The following features are available:

- Update a field
- Make a mission for yourself
- Send an email to [email protected] send an outgoing message to someone.

Workflows are an excellent learning tool for any new administrator because of their simplicity and clarity. It is fairly unusual for issues to occur because of how easily they operate. Workflows obviously have some restrictions, but if your organization is large and you have a lot of data, workflows should be able to handle it with no problem.

## C. Flow

The Visual Flow tool, commonly referred to as Visual Flow, is primarily employed to create wizard-style panels that may lead a user through a series of operations while updating data along the way.

The most effective declarative Salesforce automation tool you have ever heard of is called Flow, and many administrators ignore it as an icon. Flow has a lot more functionality than other automation applications and may be used without a panel resembling a wizard.

The following features are included: All functionalities in.

- Process Builder.
- The ability to remove records and change any record in the system (not just related).
- Wizard-style displays.

With the help of Flow, administrators can access "code-like" functionality without having to write a single line of code themselves. The task is normally completed by Flow if Process Builder is unable to do so. In terms of both individual traits and the overall impression, it is, in general, much more potent.

## D. Apex

Apex is the programming language used by Salesforce, and it can be used to perform practically any task on the platform.

Even if you are not a developer, you should be aware of why Apex is used and what it is capable of as the majority of complex implementations will require it for a variety of reasons. All the functionality listed in the previous tools, as well as a few extras, are present in Flow.

Since Apex is very scalable, it can easily manage any large-scale implementations where limitations are typically an issue. Apex is used to help when declarative tools are unable to finish the job. The fact that this technology is restricted to Salesforce platform products is a drawback.

## 6. CONCLUSION

Salesforce is a formidable CRM platform that may assist organizations in streamlining their operations and increasing revenue. Determining which operations to automate and how to do so can be difficult, though. It is always a creative idea to sit back and weigh the benefits and drawbacks of a feature before choosing it to solve a challenging business problem. You must decide which function each tool on this list will serve in the Salesforce ecosystem because each one has a distinct duty to play. Salesforce is dedicated to giving both big and small organizations the resources they require.

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